



STATE OF MICHIGAN  
DEPARTMENT OF EDUCATION  
LANSING



MICHAEL P. FLANAGAN  
SUPERINTENDENT OF  
PUBLIC INSTRUCTION

JENNIFER M. GRANHOLM  
GOVERNOR

January 30, 2009

**MEMORANDUM**

**TO:** Local and Intermediate School District Superintendents, Public School Academy Superintendents, Public Universities and Community Colleges, Public School Academy Authorizers and Other Interested Parties

**FROM:** Mike Flanagan, Superintendent of Public Instruction 

**SUBJECT:** Announcement of Upcoming Charter School Planning Grant Deadline

The Michigan Department of Education's Public School Academy Program is accepting grant applications in connection with the Federal Charter Schools Grant Program. These funds are designated for use during the 2008-09 school year to strengthen the pool of charter school developers in Michigan.

Please see the attached memo and grant announcement for more information. Questions regarding the Charter School Grant should be directed to Greg Olszta in the Office of School Improvement, Public School Academy Program, at 517-373-4631.

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STATE OF MICHIGAN  
DEPARTMENT OF EDUCATION  
LANSING



MICHAEL P. FLANAGAN  
SUPERINTENDENT OF  
PUBLIC INSTRUCTION

June 10, 2008

**MEMORANDUM**

**TO:** Local and Intermediate School District Superintendents, Public School Academy Superintendents, Public Universities and Community Colleges, Public School Academy Authorizers and Other Interested Parties

**FROM:** Mike Flanagan, Superintendent of Public Instruction

**SUBJECT:** Announcement of 2008-09 Charter School Planning, Implementation and Dissemination Grant Opportunity

The Michigan Department of Education (MDE) expects to receive from the United States Department of Education (USED) a grant award of approximately **\$7,978,981** for use during the 2008-09 school year to strengthen the pool of charter school developers in Michigan. Contingent on final approval of funds from USED (expected this month) three types of sub-grants are anticipated:

- 1) Upon notification during June or July by a qualified Michigan authorizer that a **development team is engaged in final negotiations of a charter contract leading to a Fall 2008 or a Fall 2009 opening**, those teams will be invited to compete for twelve-month planning grants or for twelve-month implementation grants with award dates of September 1, 2008. The competitive grant awards can be for up to \$160,000 in planning expenses, and successful completion of the planning grant qualifies the PSA to apply for further first and second year implementation funding of \$150,000 annually.
- 2) **Earlier stage PSA developers planning for a Fall 2010 opening** will be eligible to compete for eighteen-month planning grants with an award date of April 1, 2009. These competitive grant awards will also be up to \$160,000 in planning expenses, and successful completion of the planning grant, along with acquisition of a charter, will qualify the PSA to apply for further first and second year implementation funding of \$150,000 annually.

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Applications for these eighteen-month competitive 2008-2009 Charter School Planning/ Implementation Grant Program funding will be posted on the MDE's website ([www.michigan.gov/charters](http://www.michigan.gov/charters)) during July 2008. An informational meeting for eligible grant applicants will be held during September 2008. Please call the Public School Academy number noted below if you would like your name added to a list of interested parties who will be notified as information becomes available. The deadline for application is January 15, 2009. The applications will be available and must be submitted through the *Michigan Electronic Grants System (MEGS)*.

- 3) A portion of the 2008-2009 federal award (\$500,000) will be available to **charter schools that have been in operation for at least three (3) consecutive years** (i.e., are currently in their fourth year of operation, or longer), **have not already received a Dissemination Grant, and wish to propose activities intended to mentor a design team for a PSA** that is not yet open. Grant proposals of up to \$100,000 will be considered.

Eligible charter schools have been identified and posted on the MDE's website ([www.michigan.gov/charters](http://www.michigan.gov/charters)). Individual information sessions are available for eligible applicants as needed and can be scheduled by calling the Public School Academy number below. The deadline for application submission is July 10, 2008. The applications are now available and must be submitted through MEGS.

Questions regarding the Charter School Grant should be directed to Joann Neuroth in the Office of School Improvement, Public School Academy Program, at 517-373-4631.

**Michigan Department of Education  
Public School Academy Program**

**ANNOUNCEMENT OF  
2008-2009 CHARTER SCHOOL PLANNING AND IMPLEMENTATION GRANTS**

**No Child Left Behind Act  
Title V, Part B, Public Charter Schools Program  
In Cooperation with the U.S. Department of Education**

**INTRODUCTION**

The Michigan Department of Education (MDE) is pleased to announce the 2008-2009 Charter School Grant. The program is supported under Title V, Part C, Public Charter Schools Program (PCSP), No Child Left Behind Act of 2001. The Michigan Department of Education (MDE) was successful in receiving a grant under this program for \$22,802,234 over a three year period, including \$7,978,981 for: (i) planning grants to support qualified public school academy developers as they apply for charter contracts, and (ii) implementation grants to public school academies in the first two years of operation.

**DEADLINES**

MDE will accept grant applications for funding up to 18 months of a project period from earlier stage PSA planners who have submitted an application to a Michigan authorizer, but who have not yet received a charter contract. MDE expects most applicants to use up to 18 months to plan for 2010 or 2011 school openings. Interested applicants must obtain a Michigan Education Information System (MEIS) account number, obtain a temporary district code, and submit a Michigan Electronic Grants System (MEGS) authorization form by **April 1, 2009**. Completed applications must be received at the Michigan Department of Education by **April 16, 2009**. Review panels are expected to score the applications by mid-May; grant announcements are expected by June 15 for a July 1, 2009 award date.

**PUBLIC SCHOOL ACADEMIES IN MICHIGAN**

Charter schools in Michigan are designated generally in statute as "Public School Academies" and must be organized under one of three sections of the Michigan Revised School Code. Please go to [www.legislature.mi.gov](http://www.legislature.mi.gov), click on "Basic MCL Search" (on the left hand menu) and enter the MCLA numbers below to download and read the entire applicable sections of law before deciding which kind of PSA is being developed:

- Part 6A (MCLA 380.501-380.507) for Public School Academies
- Part 6C (MCLA 380.521-380.529) for Urban High Schools
- Part 16 (MCLA 380.1311b-380.1311i) for Strict Discipline Academies

Public school academies must be tuition-free and non-discriminatory in all policies and procedures.

Most of Michigan's "Public School Academies" as defined in statute meet the federal definition of a "charter school" and are thus eligible for Program Planning and Implementation grant funds. However, some PSAs that do not count pupils for the purpose of receiving state aid do not meet federal criteria for eligible applicants. Contact MDE staff (at 517/373-4631) to determine the PSA's eligibility if the proposed charter school does not intend to count pupils for the purposes of receiving state aid.

**GRANT PURPOSE**

The purpose of this grant program is to:

- broaden and strengthen the pool of charter applicants available to Michigan authorizers, and
- support those charter applicants that succeed in obtaining a charter contract as they launch the schools they planned.

To that end, MDE invites proposals from PSA developers for up to 18 months of Program Planning and Design in three stages:

- Stage One: Refinement of an ambitious, innovative academic vision, and design of a data-based program evaluation methodology that will demonstrate to the governance body whether the vision is succeeding. Up to \$35,000 will be released upon award for use in completing these deliverables.
- Stage Two: Development of a sound, comprehensive business plan to support the academic vision and finalization of a full charter application strong enough to secure a charter contract from a Michigan authorizer. Up to \$75,000 of additional funds will be released upon satisfactory completion of Stage One for use in completing these deliverables.
- Stage Three: Ramping up operations toward opening, including engaging and training staff. Up to \$50,000 of additional funds will be released upon acquisition of a charter contract. (A grantee that meets the requirements of Stage One or Two upon application (or that can complete them using less than its Stage One/Two funding) may use all of its funding for later stage planning activities.)

Implementation funding is available to successful planning grantees for up to the first two years of operations of a new PSA for purposes of equipping and supplying the school; developing needed materials and systems; and acquiring curriculum materials, texts, classroom equipment, and supplies. Successful planning grantees apply, but do not compete again for implementation funds.

This grant and the federal statutes that accompany it require strict and full adherence to the Public Charter School Program (PCSP) "single grant standard." This "single grant" provision says that an applicant that receives a grant under this competition is eligible for up to thirty-six (36) months of total allowable funding dependent upon the date of the grant award, the date of authorization of the charter school, and the availability of federal funds.

Notification of this grant has been made available to Michigan Intermediate School Districts, Local Educational Agencies, Public Universities, Community Colleges, organizations, and other interested persons. It will also be posted to the Michigan Department of Education website at <http://www.michigan.gov/charters>.

## **ELIGIBLE/LEGAL APPLICANTS**

Only nonprofit corporations are eligible to apply. If a school has received a charter, the nonprofit PSA corporation holding the charter contract may apply. Development Teams that have applied for but not yet received a charter contract must be nonprofit corporations to apply for a grant.

Applicants must have applied to at least one Michigan authorizer for a charter contract. In addition, the applicant must have informed the authorizer of their intent to apply for federal charter school planning funds and provided the authorizer with a copy of their grant application. A copy of the authorizer notification/transmittal letter must be sent to MDE prior to the application deadline. MDE will check to ascertain that these steps have been completed before the review of any grant application.

Program Planning and Design grant awards are specific to the proposed or authorized public school academy and the community targeted at the time that the application is submitted. The grant award competition weighs the projected need of the community identified, students to be served, and how the charter school will address those needs. If a proposed charter school is awarded a Program Planning and Design grant and changes the originally identified community location of the project, the grant will not transfer to the school in a new community location without substantial post-award documentation of the identical need of the community and the essential applicability of the original proposal to the school in its new location.

Grant award recipients that later change the name of the school must provide the written assurance of the authorizing entity that the PSA authorized is essentially the same proposed school that was originally awarded the grant.

A for-profit entity does not qualify as an eligible applicant. An educational service provider (ESP) may help prepare an application for a grant award if it is acting as an agent of the charter school or proposed charter school board. However, an ESP must provide documentation that they are acting as the agent of an eligible nonprofit applicant, and the contact person for the application must be part of the nonprofit development team and not part of the ESP.

**Planning and implementation funds may only be awarded one time. If a nonprofit working with a proposed charter school has already received a planning grant, it may not receive a second planning grant. A separate and distinct nonprofit corporation must be used for each proposed charter school.**

For information, forms and instructions regarding nonprofit incorporation in Michigan, visit the Department of Labor and Economic Growth (DLEG) website at [www.mi.gov/dleg](http://www.mi.gov/dleg). Choose commercial services and corporations...business services ... corporations ... domestic nonprofit corporation. Please note that Michigan allows two specialized types of corporations, both of which actually operate schools (as grantees will not do during the term of the grant):

- PSA corporations, and
- Education corporations

Each of these requires compliance with additional regulations; NEITHER is necessary for grant eligibility purposes. Development Teams seeking incorporation are encouraged to secure **general nonprofit incorporation**. Applicants for incorporation should not state in the purposes outlined in that application that they will operate a school. If the team succeeds in obtaining a charter contract from an authorizer, a PSA corporation that will operate the school will be formed as part of the chartering process.

## **GRANT RANGE AND LENGTH OF AWARD**

During the three year grant cycle, funds up to **\$160,000 for up to 18 months** of program planning and design may be used for activities consistent with federal law, including but not limited to:

- Articulation and refinement of desired educational results;
- Identification of methods capable of achieving desired results;
- Professional development of teachers and staff that will work in the school, or of volunteer board members;
- Planning, procurement, or development of testing designed to measure student achievement;
- Design of formative evaluation processes that feed information about student achievement back to teachers, or information about contractual and financial compliance back to administrators;
- Staff salaries and benefits for planners and administrators prior to opening the school and becoming eligible for state aid;
- Technology and office equipment, software, and limited office furniture to serve planning staff during the start-up period (not classroom equipment);
- Legal and professional costs related to planning for the school and its educational program;
- Costs directly related to compliance with legally mandated school health and safety inspections including minor building modifications to ensure compliance (e.g., the installation of grab bars or lowering of sinks in a restroom). However, larger renovations such as elevator installation or repair, for instance, are not allowable;
- Fees to trainers or consultants to provide training, system design or staff development;
- Reasonable costs of travel, lodging etc. to enable staff to participate in learning.

Two additional grants of up to **\$150,000 for up to 24 months of implementation** (which may begin shortly before the school opens) may be awarded to successful planning grantees for activities consistent with federal law, including but not limited to:

- Informing the community about the school (for instance radio, print or electronic media development and dissemination costs, but not building signage);
- Acquiring technology equipment and software for classroom use (e.g., computers, printers, LCD projectors, etc. as well as hook-up and installation costs);
- Texts and library books for use in the educational program;
- Desks, tables, chairs and bookshelves, etc., for use in the educational program;
- Educational supplies and materials (does not include general use office supplies/equipment),
- Acquiring or developing curriculum materials, aligning with state expectations and preparing staff to use those materials.

**Planning/Design and Implementation grants may be awarded for a total period of up to three years (36 months), with no more than 18 months used for planning, and no more than two years (24 months) used for initial implementation of the PSA.** Note that this means that a grantee that opts for 18 months of planning time will receive only 18 rather than 24 months of implementation time. The applicant should propose a customized schedule that fits its unique situation, while ensuring that no more than 36 months total are used.

All funding will be subject to approval by the Superintendent of Public Instruction, based on reviewer ranking, comments, availability of funds, and Department recommendations.

## **REJECTION OF PROPOSALS**

The Michigan Department of Education reserves the right to reject any and all proposals received as a result of this announcement.

## **CLOSING DATE**

**For developers planning for 2010 or 2011 openings:**

Interested applicants must obtain a MEIS number, submit a MEGS authorization form, and obtain a temporary district code by **April 1, 2009**. Completed applications must be received at the Michigan Department of Education by **April 16, 2009**. Review panels are expected to score the applications by mid-May; grant announcements are expected by June 15 for a July 1, 2009 award date. Applications that do not meet these deadlines will not be reviewed for consideration of funding.

## **REVIEW PROCESS**

All applications will be evaluated using a peer review system. Qualified individuals from across Michigan's charter school sector will form a panel to score applications based on merit, quality and thoroughness, as determined by the rubric included at the end of this announcement. Applicants are encouraged to self-evaluate draft proposals using the rubric, and revise content until they are clear that reviewers will find the particular qualities asked for by the rubric.

All funding will be subject to approval by the Michigan Superintendent of Public Instruction. All applicants will be notified of the Superintendent's action.

Applicants may wish to refer to the Michigan Department of Education's *"Proposal Development Guide"* for additional assistance in developing their proposal. This guide may be found under [http://www.michigan.gov/documents/propdevguide\\_13484\\_7.pdf](http://www.michigan.gov/documents/propdevguide_13484_7.pdf).

## FUNDABLE ACTIVITIES

**Applicants must focus on one or more of the allowable activities listed below.** The examples listed on pages 3-4 above are illustrations of costs which have in the past fallen under these statutorily allowable activities. Under the allowable activities described in Public Law 107-110, Title V, Part B, Section 5204 (f)(3), grant funds must be used for the following:

### PROGRAM PLANNING AND DESIGN GRANTS:

1. Post-award planning and design of the educational program, which may include:
  - a. refinement of the desired educational results and of the methods for measuring progress toward achieving those results; and
  - b. professional development of teachers and other staff that will work in the charter school; and

### IMPLEMENTATION GRANTS:

2. Initial implementation of the charter school, which may include:
  - a. informing the community about the school;
  - b. acquiring necessary equipment and educational materials and supplies;
  - c. acquiring or developing curriculum materials; and
  - d. other initial operational costs that cannot be met from State or local sources.

## REQUIRED ACTIVITIES

Among the activities included in each Program Planning and Design grant application's budget and budget work plan must be participation in a series of mandatory technical support services developed and coordinated by the Michigan Association of Public School Academies (MAPSA) to strengthen the quality of the charter applications under development. Periodic resource, networking and informational sessions will address:

- Orientation to managing a federal grant,
- Introduction to Michigan and national teaching and learning models showing demonstrated success in high student achievement, including those serving at-risk student populations,
- Introductions to currently operational Michigan PSAs eligible to serve as mentors to development teams,
- Orientation to responsibilities of a PSA Board Member,
- Coaching on how to approach potential authorizers.

The year-long networking fellowship will be invoiced to each grantee at \$10,000 over the first 12 months of the grant. **Plan for this expense in your management plan and budget.**

## PAYMENT SCHEDULE

Payments to grantees will be made upon filing the MDE's "Expenditure/Request Form, DS-4492A." The grantee is permitted to request reimbursements and advance payments not exceeding actual immediate cash needs up to the total amount of the award. "Immediate cash needs" means that the recipient needs funds within three (3) days to pay bills incurred.

## PERFORMANCE REPORTING

Effective in January 2009, monthly updates will be due on the last day of the month relative to your activities. Required formats and submission requirements will be provided.

## Updated Drawdown and Reporting Schedule

MDE will make Planning Grant funds available according to the following drawdown and reporting schedule.

- Following submission of any additional required information needed for completion of Stage 1 and an approved project budget, \$35,000 in Planning Grant funds will be available for drawdown.
- After the first \$35,000 has been spent, a grant progress report and a detailed itemized financial accounting of expenditures and supporting documentation are due from the Planning Grant recipient. No additional funds may be drawn down until these reports have been reviewed and approved by MDE. Turnaround time for this approval process is expected to take no longer than ten business days.
- Following MDE approval of grantee progress and financial reports, and submission of additional information required for Stage 2 approval, up to \$75,000 is made available for drawdown.
- After the next \$75,000 has been spent, a second grant progress report and a detailed itemized financial accounting of expenditures are due from the Planning Grant recipient. No additional funds can be expended until:
  - These reports have been reviewed and approved by MDE, AND
  - The grantee has received a charter from a Michigan PSA authorizer.
- Following MDE approval of grantee progress and financial reports and awarding of a valid Michigan charter, the remaining \$50,000 in grant funds will be available for drawdown.

Required formats and submission requirements will be provided.

## **FINANCIAL REPORTING**

The Department's "**Final Expenditure Report Form**" is used for final financial reporting and must be completed online by **60 days after completion of the project**. Failure to complete the report could result in **loss of funding** which the grantee must repay to the Michigan Department of Education.

## **FINANCIAL AUDIT OR REVIEW**

The MDE reserves the right to conduct a financial audit or review of the subgrantee's program expenditures at any time during the subgrant period. Grantees are required to obtain a financial audit or basic set of financial statements for the years of the project period. **Plan for this expense in your management plan and budget.**

## **FUTURE FUNDING**

If federal funds continue to be appropriated under the Charter Schools Grant Program, grants will again be available in 2009-2010.

## WHERE TO OBTAIN ASSISTANCE

These materials are issued by the Michigan Department of Education, Public School Academy Program, which is the sole point of contact in the state for this program. Questions not answered by information on the web at [www.mi.gov/charters](http://www.mi.gov/charters) should be directed to the Public School Academy Program, Office of School Improvement at 517/373-4631.

Other resources:

Michigan Association of Public School Academies (MAPSA)  
215 South Washington Square - Suite 135  
Lansing, MI 48933  
phone: 517-374-9167  
fax: 517-374-9197  
[www.charterschools.org](http://www.charterschools.org)

MAPSA is the association of operational PSAs, and offers technical support and assistance to development teams.

Michigan Association of Charter School Boards (MACSB)  
2284 Fieldstone Drive  
Okemos, Michigan 48864  
phone: (517)819-4777  
[info@macsb.org](mailto:info@macsb.org)

MACSB provides web-links to the governing boards of existing PSAs, offers periodic workshops and conferences, and some orientation material for new board members.

National Charter Schools Institute (NCSI)  
2520 University Park  
Mt. Pleasant, MI 48858  
Phone: (989) 774-2999  
[www.nationalcharterschools.org](http://www.nationalcharterschools.org)

NCSI supports charter schools with board training, policy development, publications and organizational consulting.

Commercial Services and Corporations  
Department of Labor and Economic Growth  
[www.mi.gov/dleg](http://www.mi.gov/dleg) ... choose commercial services and corporations...business services ... corporations  
... domestic nonprofit corporation.

DLEG's Corporation Division provides forms and instructions for nonprofit incorporation.

# APPLICATION CHECKLIST

Completing each of the action items listed below will help ensure timely and accurate submission of all grant materials.

## **By April 1**

### **1) Obtain a MEIS account**

- i) To get a MEIS account go to: [cepi.state.mi.us/MEISPublic](http://cepi.state.mi.us/MEISPublic), then click the text *Create a MEIS Account*, and then follow the instructions. **At the final step, print the account verification form.**

### **2) Obtain a temporary district code**

- i) To obtain a temporary district code: contact Kim Sidel in the Public School Academy Program at (517) 373-3345.

### **3) Register in MEGS**

- i) To register in MEGS: download the security agreement available at [http://www.michigan.gov/documents/MEGS-Security-Agreement\\_85716\\_7.pdf](http://www.michigan.gov/documents/MEGS-Security-Agreement_85716_7.pdf) and fax to the number listed on the bottom of the form.

### **4) Register the nonprofit corporation**

- i) For information, forms and instructions regarding nonprofit incorporation in Michigan, visit the Department of Labor and Economic Growth (DLEG) website at [www.mi.gov/dleg](http://www.mi.gov/dleg).

## **By April 16**

### **1) Submit the Charter Application to a Michigan Authorizer**

- i) The following authorizers have said they are willing to accept charter applications at the current time. **Please do not contact any other authorizer except in response to a current solicitation or request for applications.**

Grand Valley State University  
Charter Schools Office  
10 Straight Street  
Grand Rapids, MI 49504  
<http://gvsucso.org/>  
616-331-2240

Oakland University  
PSA Office  
420 Pawley Hall  
Rochester, MI 48309  
<http://www4.oakland.edu/?id=54&sid=61>  
248-370-4236

### **2) Notify authorizer of intent to apply for federal funds, and provide the authorizer with a copy of the grant application.**

- i) A copy of the authorizer notification/transmittal letter must be sent to the Michigan Department of Education, Public School Academy Program at 608 W. Allegan, Lansing, MI 48933, prior to the application deadline. MDE will check to ascertain that these steps have been completed before the review of any grant application.

### **3) Complete and upload narrative questionnaire. Please adhere to page limitations.**

### **4) Complete and upload management plan template**

- i) An MS-Word template may be downloaded from [www.mi.gov/charters](http://www.mi.gov/charters) or from inside the MEGS charter school grant application. When you have completed the Management Plan, use the "Narrative and Management Plan Uploads" page to attach the file to your MEGS grant application.

### **5) Complete the MEGS "Budget Summary" "Budget Detail" and "Future Funding" pages**

- i) Open the "Add Budget Item" tab in MEGS. Copy and paste each task from your management plan (including its identifying number) into the description window. Select the appropriate Function Code. Click on Add Item. Repeat.
- ii) Please note that you are budgeting for purposes of this grant program only (up to \$160,000 for planning grants only, and two possible future implementation grants of up to \$150,000 upon receipt of a charter). Future school operational costs should not be included in this budget.

### **6) Commit to the required assurances and certifications**

- i) When you click the SUBMIT button, a list of assurances and certifications will appear. Read each one carefully to ensure that you are willing to comply and then continue with the submission process only if you intend to comply.

Michigan Department of Education  
Public School Academy Program

## APPLICATION

### 2008-2009 CHARTER SCHOOL PLANNING AND IMPLEMENTATION GRANTS

To be considered for Charter School Planning/Design and Implementation grant funding in Michigan, applicants must complete 5 steps:

**1) Certify that the applicant is an eligible applicant:**

A) The PSA developer team has applied for a charter contract with at least one active Michigan authorizer, and that the PSA has notified the authorizer of its intent to apply for federal funds and copied MDE on its notification.

B) The PSA developer is a nonprofit corporation that can provide adequate documentation to this effect from the state in which it is domiciled.

Open the MEGS application. In the "Program Information" section, use the Applicant Information page to identify any authorizers to which you have submitted charter applications and informed them of your intent to apply for federal charter school planning and implementation grant funds.

The same page asks for the Michigan Nonprofit Incorporation ID number. If the nonprofit corporation is incorporated in another state, please call Kim Sidel at (517) 373-3345 for more information about how to complete this portion of the application process.

**2) Answer the narrative questionnaire** that follows, outlining the school that you proposed to the charter authorizers above. If you do not yet know the answers to any question, state that and outline the steps you would take as part of your grant funded work to determine your answers. An MS-Word template may be downloaded from [www.mi.gov/charters](http://www.mi.gov/charters) or from inside the MEGS charter school grant application. When you have completed the narrative, use the "Narrative and Management Plans Uploads" page in MEGS to attach the NARRATIVE file to your MEGS application.

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**\*\*\*\*\*PLEASE NOTE: Applications are limited in length. Your narrative (including exhibits and appendices) may be no longer than fifty (50) pages in total.\*\*\*\*\***

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## Grant Application Narrative

### Assessment of Community Need

1) Describe the **characteristics, population and unmet educational needs of the community** where the proposed charter school will be located, paying particular attention to the impetus for and level of interest in the school. Where possible, detail any objective market research, surveys, or other measures of local demand for the proposed educational program.

2) List and describe the existing schools in the area (public, private and parochial) serving the community, and detail the **competitive advantages** that will set the proposed charter school apart and attract students.

### **Student Population**

3) Detail the proposed **grade levels and/or range of ages** of students to be served, along with plans for future growth. Show how your plan has been shaped by the developmental needs of students to be served.

4) Describe the **characteristics of the anticipated student population**. Identify where these students are most likely being educated currently and why they are expected to choose the proposed charter school for the future educational needs. Estimate the percentage of students the proposed charter school expects to qualify for federal free and reduced lunch subsidies.

5) Detail the proposed charter school's **anticipated enrollment** in years one through five, projecting the minimum and maximum enrollment the school is prepared to serve in each year.

### **Educational Program**

6) Describe the vision, mission and **educational goals** of the proposed charter school. Explain how this mission will provide leadership in one or more areas to other Michigan public schools.

7) Describe the evaluation process and the criteria used by the development team to **compare curricular and instructional approaches**. Explain why the approaches chosen (and described in #8 and #9 below) fit the PSA's target market and its educational goals.

8) Provide a general description of the **curricula** to be used. Explain how you have determined (or will determine) that these curricula will lead all students to mastery of Michigan's Grade Level Content Expectations (GLCE) or High School Content Expectations (HSCE) as appropriate.

9) Provide an overview of the **instructional design** and program to be emphasized by the school, with particular emphasis on how this approach will enhance student achievement. Be sure to detail the research foundations for the educational approach(es) to be utilized. Outline steps the school will take to ensure that its teachers understand, gain skills needed for and practice the instructional model chosen.

10) Describe the **support services** to be provided by the school (e.g., Head Start, latchkey, extracurricular activities, tutoring, computer training) and explain how these services will relate to and/or improve program quality.

11) Describe the ways in which the proposed charter school will ensure high-quality services to students with **special needs**. Include a description of how the proposed charter school will participate in development of the county-specific ISD special education plan, which ensures compliance with the Individuals with Disabilities Act (IDEA).

12) If you seek any **waivers** of federal or state requirements that you believe to be important to the success of your school, please identify the regulation(s) and provide a rationale for seeking an exception.

### **Attendance and Participation**

13) Specify the proposed charter school's anticipated **date of opening**, and briefly describe the proposed school **calendar** and **school day schedule**.

14) Briefly describe the proposed charter school's **advertising and recruitment plans**, paying particular attention to any early intervention and/or other **retention strategies** which will be employed to maximize retention and to ensure equal access for all.

15) Describe proposed methods for **involving parents and community members** in the design of the school and the education of enrolled students.

### Assessment and Evaluation

16) Describe the **assessment program** and related strategies, detailing how results will be used to improve teaching and learning.

17) Describe the anticipated **annual standards** or measures of student achievement that you expect. Take into account that MEAP is not given for every grade in every year. How will you set annual growth targets? How will you communicate progress toward the standards/targets to students and parents?

18) Michigan's **School Improvement Framework (SIF)** outlines objectives of public schools that go beyond student achievement – for instance, leadership, climate, community involvement, teacher retention etc. (See the full SIF at [http://www.michigan.gov/documents/SIF\\_4-01-05\\_130701\\_7.pdf](http://www.michigan.gov/documents/SIF_4-01-05_130701_7.pdf)) Identify what data the governance body intends to collect to determine whether the school is achieving these objectives.

### Project Team

19) List the name(s) and address(es), and role(s) of all principal **organizer(s) of the proposed charter school**. Briefly describe the strengths, experiences, and expected contributions of each member of the development team.

20) Name the **Board of Directors for the nonprofit applicant**, and provide contact information for each (address, telephone, email). Identify officers of the Board. Please note that grant funds may not be used to pay board members for services provided.

21) Briefly describe the anticipated staffing, management and **governance structures for the proposed charter school**. Name the PSA Board candidates to be proposed. Some training for prospective board members will be included in the required technical support fellowship; outline here any additional training and orientation planned to enable them to understand their governance responsibilities.

22) List the **authorizer(s)** to which the nonprofit has applied for a charter and describe the progress made toward obtaining a charter to date. Describe the team's past efforts to obtain a charter, if any, and detail related outcomes. Describe the way in which your proposed school will support a strong administrative relationship with a future authorizer.

23) Describe all anticipated **contractual relationships** the school expects to enter into to ensure the establishment and effective operation of the proposed charter school. Address any anticipated **related party transactions**, paying particular attention to any relationships between the persons identified in Questions 20-21 and anticipated Education Service Providers and/or anticipated facility owners/lessors/sellers.

### Facilities

24) Provide a description of the physical facility, suitability of space and provisions for specialized space (if any). If no facility has yet been identified, describe the activities you will undertake to locate possible sites and criteria you will use to evaluate them.

25) Describe any purchase or leasing arrangements, and/or construction or renovations that must occur to ensure adequate facilities. Include detailed information about anticipated budget, costs and financing arrangements. Indicate what stage the preparations are in and what work has been completed, and what your estimated timeline for completion will be.

26) Describe proposed arrangement for transportation of pupils, if any.

### Financial Information

27) Detail all pre-operational costs, and describe how these costs will be covered. Indicate the total amount and sources of pre-operational funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated and include evidence of firm commitments if possible. Detail plans for meeting financial needs if anticipated revenues are not received or are lower than the estimated budget.

28) Indicate whether the proposed school intends to qualify for state aid as an operational source of funds. Describe how the nonprofit corporation will provide for continued operation of the proposed school after the grant period.

29) Detail whether you plan to use other federal funds or programs administered by the U.S. Secretary of Education to supplement the budget of the proposed school.

### Conclusion

30) Present any other information you believe to be relevant or compelling in support of your application.

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**\*\*\*\*\*PLEASE NOTE: Applications are limited in length. Your narrative (including exhibits and appendices) may be no longer than fifty (50) pages in total.\*\*\*\*\***

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**3) Complete the management plan template below.** Select your planned activities with budget stages in mind. Activities in Stage 1 cannot be budgeted for more than \$35,000, and the total budgeted for Stages 1 and 2 cannot exceed \$110,000. However, you do not have to allocate the full amount to either of the first two stages. If you can complete Stage 1 deliverables with fewer (or no) grant funds, you may plan to use both Stage 1 and 2 funds for the purposes of Stage 2. Similarly, if you already have a charter in hand and can meet the Stage 1 and 2 deliverables with fewer (or no) grant funds, you may plan the remainder for Stage 3 activities.

An MS-Word template may be downloaded from [www.mi.gov/charters](http://www.mi.gov/charters) or from inside the MEGS charter school grant application. When you have completed the Management Plan, use the "Narrative and Management Plan Upload" page to attach the file to your MEGS grant application.

### Management Plan

Use the form on the following page to summarize the activities you plan to undertake with grant funds, specify their products and schedule them over the project period (stage by stage) by placing a check or X in the month they will be completed. If you plan to use the full 18 months allowable under the grant, please expand the management plan to reflect the longer time frames and additional tasks/products.

Stage 1 Purpose: Refinement of an ambitious, innovative academic vision, and design of a data-based program evaluation methodology that will demonstrate to the governance body whether the vision is succeeding		Task Completion Date:											
Stage 1 Tasks	Products resulting from each task	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10
1-1 Board Training -- The founding board will participate in governance training from MACSB or a similar training source to orient them to governance responsibilities. (Example -- Replace with your own)	Board member knowledge about legal responsibilities, management tools. (Example -- Replace with your own)			X									
1-2													
1-3													
1-4													

Stage 2 Purpose: Development of a sound, comprehensive business plan to support the academic vision and finalizing a full charter application strong enough to secure a charter contract from a Michigan authorizer.		Task Completion Date:											
Stage 2 Tasks	Products resulting from each task	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10
2-1													
2-2													
2-3													
2-4													
2-5													
2-6													
2-7													
2-8													
2-9													

Stage 3 Purpose: Ramping up operations toward opening, including engaging and training staff.		Task Completion Date:											
Stage 3 Tasks	Products resulting from each task	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10
3-1													
3-2													
3-3													
3-4													
3-5													
3-6													

**4) Complete the MEGS "Budget Summary" "Budget Detail" and "Future Funding" pages** showing what funds you are requesting for purposes of this grant program (up to \$160,000 for planning grants only, and two implementation grants of up to \$150,000 upon receipt of a charter) and how you will use them. Open the "Add Budget Item" tab in MEGS. Copy and paste each task from your management plan (including its identifying number) into the description window. Select the appropriate Function Code. Click on Add Item. Repeat.

For definitions of the function codes used in the budget summary, see the School Accounting Manual, beginning on page 24. See [http://www.michigan.gov/documents/appendix\\_33974\\_7.pdf](http://www.michigan.gov/documents/appendix_33974_7.pdf)

MEGS will reassemble these lines into the Budget Detail pages, sorting by accounting code, and will sum them to the Budget Summary. An example is provided on the next page to show you what the entry screen on MEGS looks like.

Budget Summary	Budget Detail	Capital Outlay	Add Budget Item				
<b>Quick Links:</b> Add Personnel   Add Other   Add Capital Outlay   Download Budget Detail							
District Code	Grant Number	Project Number	CFDA Number	Project Type	Starting Date	Ending Date	Fiscal Year
00003	090610	12	84.282A	Regular	10/01/2007	09/30/2008	2009

ADD ITEM

#### Charter Schools Planning Budget Item for AAA - TEST Head Start

Select the appropriate Function Code for this budget item:

231: Board of Education

Provide a specific description for this budget item. Do not repeat the Function Code description selected in the drop down menu or the heading(s) of the box(es) used below:

1-1 Board Training - the founding board will participate in board governance training from MACSB or a similar training

Enter the dollar amount associated with the budget item. Enter an amount in only **one** box unless the item is Personnel. Personnel must have both Salaries and Benefits. To enter Capital Outlay, use the Quick Link: Add Capital Outlay.

Salaries (1000)

\$

Benefits (2000)

\$

Purchased Services (3000, Supplies and Materials 4000)

\$2500

Other Expenditures (5000) (7000)

\$

**5) Commit to the required Assurances and Certifications** by reading each one, checking the boxes and submitting the MEGS application. When you click the SUBMIT button, a list of assurances and certifications will appear. Read each one carefully to ensure that you are willing to comply and then continue with the submission process only if you intend to comply.

**Michigan Charter School Program  
Start-up Grant Application Rubric**

**Applicant:** \_\_\_\_\_  
**Reviewer:** \_\_\_\_\_

Competitive Points					
	Excellent 4	Very Good 3	Average 2	Weak 1	Not Addressed 0
<b>Assessment of Community Need</b>	Characteristics of the community are described in extensive, thoughtful, non-generic detail and include both assets and liabilities	Community analysis good but lacks 1-2 elements	Community analysis begun, but generic or superficial	Community analysis not helpful or not convincing	
Questions 1-2	Comment:				
	Unmet educational needs are described specifically enough to target an educational approach to meet them	Needs are identified but needs more detail	Some needs identified, but missing important ones	Needs analysis not helpful	
	Comment:				
	Quantitative evidence is presented that the need is recognized by potential families to be served	Anecdotal evidence is provided	Some indications of interest	Very little data on family perceptions	
	Comment:				
<b>Student Population</b>	The plan demonstrates a thoughtful understanding of the <b>developmental needs of students</b> in the age and grade ranges it proposes to serve	Good work, but lacks 1-2 important elements	Beginnings of analysis; lacks many elements	Little to no useful work evident	
Questions 3-5	Comment:				
	The plan profiles the <b>expected student population's learning needs</b> with good specificity. Attends to ethnicity, achievement, socio-economic factors	Good work, but lacks 1-2 important elements	Beginnings of analysis; lacks many elements	Little to no useful work evident	
	Comment:				
	The plan identifies the school's <b>competition</b> well and identifies convincing competitive strengths	Good work, but lacks 1-2 important elements	Beginnings of analysis; lacks many elements	Little to no useful work evident	
	Comment:				
<b>Educational Program</b>	<b>Educational goals</b> are ambitious and innovative enough that if successful, the school will provide leadership in one or more areas	Educational goals offer significant local alternatives for families	Educational goals mirror or slightly exceed neighboring schools	Educational goals not measurable enough to evaluate	
Questions 6-12	Comment:				
	Curriculum and instructional design have been <b>evaluated against state-of-the-art alternatives</b> using criteria relevant to the school's anticipated population	Strong alternatives considered; criteria unclear	Some evaluation against unimpressive alternatives	No evidence of objective evaluation	
	Comment:				
	<b>Curriculum</b> description is thorough, adapted to the expected student population, and ensures that all students can meet Michigan's expectations	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements	Little to no useful work evident	
	Comment:				
	<b>Instructional</b> approaches are clear, adapted to the expected student population, and include plans for how teachers will master the approach	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements	Little to no useful work evident	
	Comment:				
	<b>Support services</b> (i.e., latchkey, tutoring social workers etc) included in the plan have been chosen with the target population in mind	Design solid but lacks 1-2 elements:	Design needs substantial work on:	Little thought apparent about support.	
	Comment:				
	Plan for serving students with <b>special needs</b> shows evidence of understanding legal requirements AND of developing innovative means of complying with them	Approach meets requirements but lacks innovation	Approach needs substantial work on:	Inadequate attention to special needs students	
Academic Planning	Comment:				

Attendance & Participation	Advertising and Recruitment plans seem likely to generate enrollment sufficient to meet growth plan described in Question 5	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
	Comment:				
	Retention strategies are appropriate to the student population described	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
	Comment:				
	Parent and community involvement begins in the design stage and continues in substantive ways throughout	Substantive parent input is evident	Some parent input but only in limited ways	Little to no evident parent input	
Assessment & Evaluation	Comment:				
	Proposed assessment of student achievement is annual, capable of shaping and improving teaching and learning, and extensive enough to determine whether the educational goals are being achieved. Parents and students will be informed about progress regularly.	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
	Comment:				
	Annual standards for student achievement have been established; they reflect the anticipated student population;	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
	Comment:				
Questions 16-18	The school has a plan to collect data beyond student achievement and to self-assess across the School Improvement Framework categories (Teaching/Learning, Leadership, Personnel & Prof Dev, School-Community Relations, Data & Info Management)	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
	Comment:				
	Academic Planning				
	Comment:				
	Comment:				
Strength of Project Team and Management Plan	There is evidence of the Development Team's strengths relevant to the project	A plan exists for acquiring needed strengths	The gaps evident aren't yet planned for, but are reasonable to obtain elsewhere	No evidence of leadership capacity for important parts of the project	
	Comment:				
	PSA governance board membership has been identified and oriented to governance responsibilities	Application describes a good method of recruiting and orienting governance bd	Application shows an awareness of the kinds of issues about which a governance board will need orienting	Little apparent thought to the governance function.	
	Comment:				
	Plans for managing both the grant project and the proposed PSA appear reasonable and demonstrate a good understanding of legal and practical issues	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
Questions 19-23	Comment:				
	The Development Team has a clear understanding of its role relative to a future authorizer, and is proactive in its efforts to obtain a charter.	Good work, but lacks 1-2 important elements	Beginnings of good design, but lacks many elements, such as:	Little to no useful work evident	
	Comment:				
	Comment:				
	Comment:				
Business Planning	Facilities decisions or planning processes evidence solid understanding of Michigan's legal requirements and cost implications	No cost calculations, but good facilities ideas	Some facilities options are being explored	Have not yet begun to explore facility decisions	
	Comment:				
Questions 24-29	Comment:				

	Pre- and post-opening financial and budget planning is realistic, specific enough to monitor and based on rational assumptions	Good work, but lacks 1-2 important elements	Beginnings of good financial planning, but lacks many elements, such as:	Little to no useful financial work evident	
	Comment:				
	Contractual relationships proposed for the school (i.e., with an ESP or facility owner) reflect thoughtful planning to ensure any related-party relationships are disclosed and remedied.	Potential conflicts are noted, but no resolution is yet proposed	Some conflicts are noted, others remain unaddressed	Applicant shows little awareness of embedded conflicts	No conflicts are apparent
	Comment:				